

# MIXED MODE RESEARCH

Reaching the right people in the  
right way to get the data you need

By Sara Wilkinson & Leah McTiernan | June 2020

# IPSOS VIEWS

GAME CHANGERS



# WHAT DO WE MEAN BY MIXED MODE?

Mixed Mode surveys are becoming more commonplace in market research as our industry embraces new technologies and communications to facilitate participation in surveys.

There are benefits to be had for both research participants and research buyers. A Mixed Mode survey design often offers people the choice of participating in a way that best suits their survey-taking preferences and resources. By reaching people through multiple survey modes, we can achieve better population coverage and response rates – and be more efficient in terms of time and money.

Mixed Mode design can also help to future-proof surveys by integrating newer data collection modes into traditional research approaches. Survey design can be modernised by matching the survey experience with individuals' day-to-day media consumption and customer experiences.

In a typical year, Ipsos collects over 46 million primary survey research interviews globally across offline and online data collection modes. And we expect Mixed Mode research to become increasingly important now as markets emerge from the COVID-19 pandemic.

To support the emergence of 'contactless' research, this paper collates key learnings from our experience to help clients consider how Mixed Mode can be integrated into survey design, and to discover the benefits and challenges it can bring.

---

**With multiple survey modes we can achieve better population coverage, response rates, and be more efficient.**

## MIXED MODE DEFINITION

**Mixed Mode is the use of two or more different data collection modes within a single survey, within a single fieldwork country. These modes can include CATI (computer-assisted telephone interviewing), CAPI (computer-assisted personal interviewing), online and postal.**

Mixed Mode can take various forms, including:

- The sequential use of different data collection modes within a single survey, where different stages of a survey are conducted using different modes. For example, people are recruited via CATI to take part in an online survey

- Parallel use of different data collection modes within a survey, where the same stage of a survey is available in multiple modes. For example, people are recruited via a letter sent by post to take part in an online survey and a paper questionnaire is provided for people who want to participate but are unable to do so online.
- Real-time 'switch mode' within a survey, where the same stage of a survey is available in multiple modes. This means the participant can start in one mode and switch to another to complete the survey.

**Note:** Mixed mode is different to multimode, which applies different data collection modes across the fieldwork countries of a research program. Unlike mixed mode, some countries may be single mode only.

# MODE EFFECTS & HOW TO MANAGE THEM

Different data collection modes produce different survey answers. Neither is necessarily right or wrong, but they are different from each other. As such, mixing the way in which data is collected within a single study can pose challenges around how to integrate data coming from each of the modes.

Modal differences are caused by two factors: the population that the survey method reaches and the presentation that the survey method offers.

## 1. Population differences

Online and offline data collection methods have their own ways of selecting survey participants, using different sample frames. Some offline modes achieve broad population coverage using postal addresses or telephone numbers while others offer more limited geographical coverage where central locations or interview point clusters are used. However, for online modes, the participants available are limited to those parts of the population that are online.

## 2. Survey presentation differences

The way in which someone answers a question is influenced by how it is asked. The same question can be interpreted in different ways depending on the setting. In offline modes, the presence of the interviewer influences how people respond to questions. Similarly for online, how the question looks on screen has an impact.

When working with results generated by different modes within the same study, it is helpful to identify and understand the mode effects to correctly interpret the overall dataset, and to adjust for these mode effects in the data, should it be required.



## UNDERSTANDING MODE EFFECTS

Mode effects need to be isolated from other factors to allow for correct interpretation of survey results. When interviewing different sub populations via different modes, it is impossible to separate mode effects from differences between the sub populations themselves.


For example, if younger respondents were surveyed only online and older respondents surveyed only offline, and younger respondents were more favourable to a product tested, it would be impossible to determine if this was a real finding relating to the age of respondent or if this was caused by mode effects.

A better survey design in this case would see the sub-populations included in both data collection modes. While it may not be possible to survey all older people online, it is possible to survey younger people offline. The interviews of the younger respondents could be divided between offline and online modes to allow us to separate mode effects from the respondents' age.

## ADJUSTING FOR MODE EFFECTS

Once modal differences are understood, statistical recalibration to remove the unique biases of each mode can be applied to the dataset, if necessary. Recalibration allows for varying degrees of adjustment for each question variable. For some survey questions, there is little or no mode effect, so there is no need for any recalibration. But, on a survey question where a mode effect is present, a linear regression can provide an overall adjustment factor to apply to the data collected for that question.

For example, if a product scores on average "4" amongst the offline interviews collected and the same product scores "3" across the online interviews collected, an adjustment of "-1" can be applied to the offline respondents (or an adjustment of "+1" can be applied to the online respondents) for the specific question variable to remove the bias resulting from the different data collection modes.



**Some data variations should be expected when comparing data across modes, but we can take steps to minimise these differences.**

# HOW TO MIX MODES

Although modal differences will not disappear altogether, they can be managed with careful survey design.

In **sequential Mixed Mode studies**, challenges associated around the integration of data produced by different modes do not come into play because the different modes are used for each distinct stage of the survey.

In **parallel Mixed Mode studies**, different modes are used for the same stages of a survey. Some data variations should be expected when comparing data across modes, but the following rules can minimise these differences:

## Unimode questionnaire design

Wherever possible, keep the questionnaire consistent across data collection modes. All respondents should be presented with the same question and response categories for the meaning and intent of the question and response options to stay consistent. In some cases, however, questions or instructions will need to be modified so they can be understood by respondents the same way across different modes. Keep any such variation in from one mode to another to a minimum.

Rotate the order of pre-coded answer options to negate for any potential primacy or recency effects that are felt more strongly in certain interview modes.

## Face-to-face self-completion

For face-to-face and online Mixed Mode combinations, allow for self-completion in the face-to-face setting. The interviewer can recruit the respondent for the survey and then hand over the tablet to the respondent to complete the online interview themselves. This facilitates respondents having the same survey experience in both face-to-face and online environments.

## Set consistent sample controls

Though the sample frame is likely to differ by data collection mode, apply the same sample controls across modes to achieve comparable respondent profiles.

## Ensure a consistent fieldwork window

Run fieldwork in parallel across the different data collection modes to avoid the blurring of any differences that could be driven by an external event that occurred in the marketplace.



# WHY MIX MODES?

The key benefits of mixing modes include:

## Increased survey coverage



Advances in technology have broadened the range of ways we can access people to take part in market research, yet the ability of traditional and single mode data collection methods to cover all segments of the population has reduced. Mixed Mode designs can offer a more inclusive sample frame with respect to the target population.

## Truly participant-centric research



Providing participants different options for engaging in a study can better satisfy their survey-taking preferences and resources. Mixed Mode is a truly 'participant-centric' approach to research as it often provides research participants the choice of completing any given survey in the way that is most convenient for them.

## Future-proofing surveys



The integration of newer data collection modes into more traditional programs helps to future-proof research. The people that we want to include in our surveys are increasingly online and have come to expect us to invite them to participate via online contact - and we expect that this will only continue.

## Increased efficiencies



Mixed Mode research can reduce fieldwork costs by maximising the use of lower-cost modes, using higher-cost ones only where necessary. For example, cost-effective online surveys can be combined with other more expensive offline modes (such as face-to-face interviews) to reach smaller subsets of the sample and increase survey coverage. Mixed Mode can offer faster fieldwork where data collection modes run in parallel, and online facilitates the collection of large volumes of completed surveys in short timeframes.

# IPSOS EXPERIENCE

## THE ACTIVE LIVES SURVEY

### Using Mixed Mode to deliver large volumes of interviews cost-effectively.

Ipsos in the UK conducts the Active Lives Survey (ALS) on behalf of Sport England. The survey provides a world-leading approach to gathering data on how adults in England engage with sport and physical activity. The results shape and influence local decision-making as well as inform government policy.

The ALS delivers a minimum of 500 interviews per local authority in England. The achieved sample size per annum is around 175,000.

The ALS uses a postal “push to web” approach which is a cost-effective method for delivering a very large survey that can be usable for the foreseeable future.

A randomly selected sample of households are contacted by post and are invited to take part in the survey online. The online survey can be completed using a PC, tablet or mobile phone.

There is an option for people to complete a paper questionnaire which is supplied in a reminder sent to those who have not responded online.

In the most recent ALS survey, 62% of interviews were completed online and 38% were completed on paper questionnaire.

## THE EUROPEAN COMPANY SURVEY (ECS)

### Using Mixed Mode to future-proof research

The Ipsos International Social Research unit conducted the European Company Survey (ECS 2019) on behalf of Eurofound and Cedefop. 22,000 HR managers and 3,000 employee representatives in 28 European countries were recruited via CATI to complete an online survey.

Traditionally the survey had been conducted solely using CATI. In an effort to reduce the burden on respondents and improve the quality of responses, the main part of the survey was transitioned to online. CATI was retained for the recruitment part of the survey where interviewers checked eligibility and collected contact details so that an online survey link could be sent by email.

Most countries experienced between a 2:1 and a 4:1 conversion rate, where between two and four CATI recruitment interviews were required to obtain one online survey complete. The variation in conversion was likely driven by cultural differences where some countries may have experienced a “politeness” effect where people were unwilling to do the online survey but did not want to say no to the interviewer.

Emails containing the online survey invitation were sent directly after the CATI recruit and reminders (email and CATI) were built in to the survey process to maximise response rates.

The online survey design was device agnostic so that people could take the online survey on their PC, tablet or mobile phone.

## BARB AND IPA TOUCHPOINTS

### **Using Mixed Mode to deliver large-scale audience measurement.**

Ipsos in the UK conducts the Touchpoints survey on behalf of the Institute of Practitioners in Advertising (IPA) bringing unique insights into the daily life and media usage of people in Britain.

Over 60,000 telephone numbers are dialled annually to recruit a balanced sample of over 10,000 adults to participate in a seven-day diary and lifestyle survey.

The survey includes a helpline service to maximise participation among members of the public who never go online on a device of their own to complete the survey.

The Broadcasters' Audience Research Board (BARB) Establishment Survey is a large-scale programme that uses an address-based sample and face-to-face data collection.

Following a decline in face-to-face participation over the past decade, the Establishment Survey has adopted an Online Second approach, whereby a small proportion of interviews are generated online. Non-productive addresses are selected and sent an invitation by mail to complete the same interview online. A response rate of around 10% is achieved.





## SUMMARY

Mixed Mode research provides many benefits, importantly but not limited to the fact that it is participant-centric. But it requires careful management to get right.

The blending of survey data generated via different modes can pose challenges stemming from the inherent population and presentation differences between them. Careful survey design in support of consistency across modes can help minimise modal differences but they will likely still remain to some extent. Understanding these differences is key in securing the right interpretation of survey results.

With a wealth of Mixed Mode experience spanning online, face-to-face and CATI coverage in different combinations and across a range of sectors, Ipsos is well-placed to continue to deploy mixed mode research studies as markets reopen following the COVID-19 pandemic.

Ipsos has entered a phase of experimentation to discover how best to accomplish contactless Mixed Mode. Our next paper will highlight the results and lessons we have learned from these studies in multiple markets.



# MIXED MODE RESEARCH

---

**Sara Wilkinson** Director, Ipsos Interactive Services Global Research on Research

**Leah McTiernan** Global Director, Business and Community Development, Total Operations, Ipsos

The **Ipsos Views** papers  
are produced by the  
**Ipsos Knowledge Centre.**

[www.ipsos.com](http://www.ipsos.com)  
[@Ipsos](https://twitter.com/Ipsos)

**GAME CHANGERS**

